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R&I's 1987 TASTES OF AMERICA CONSUMER

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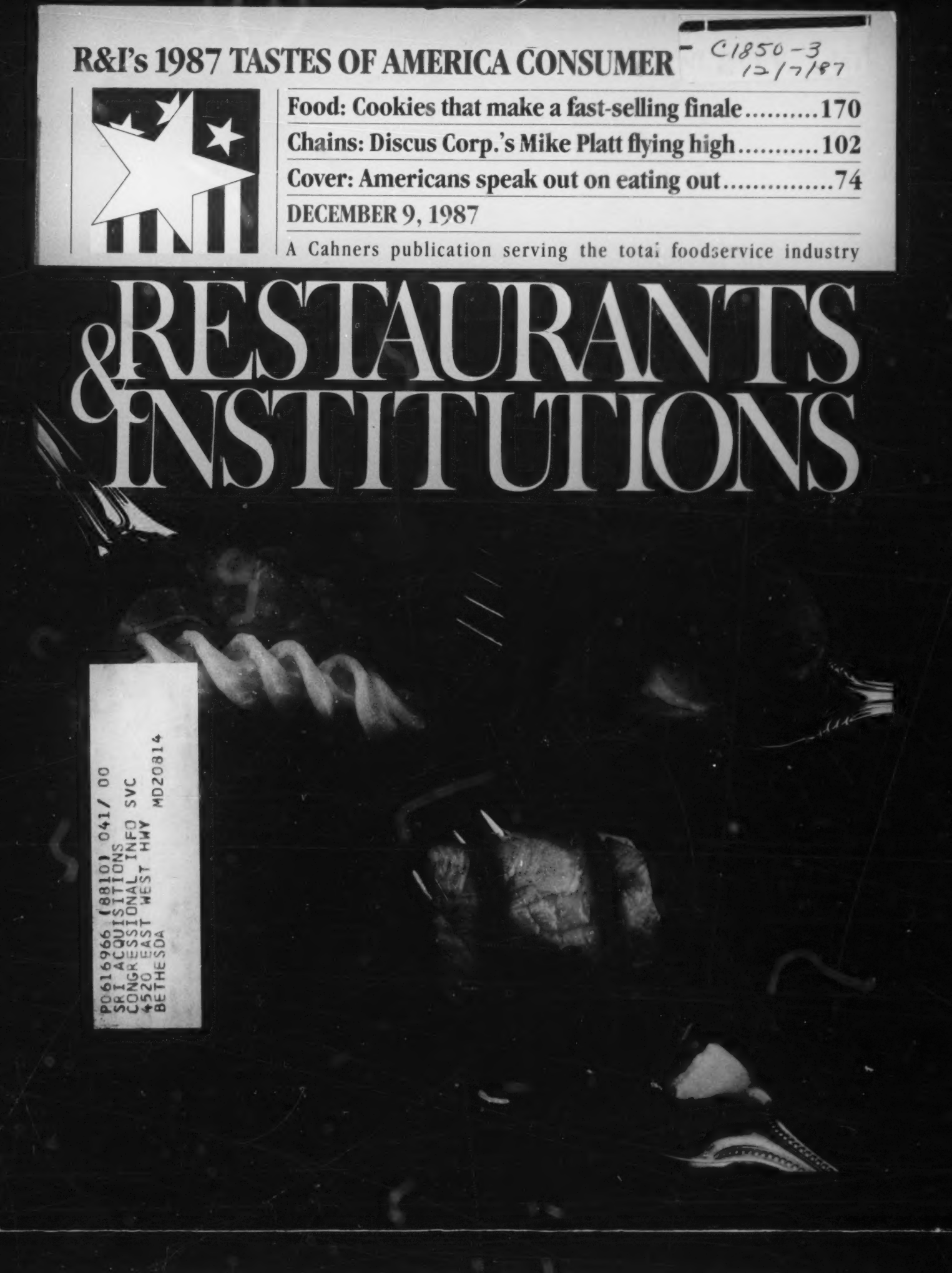
DECEMBER 9, 1987

A Cahners publication serving the total foodservice industry

RESTAURANTS & INSTITUTIONS



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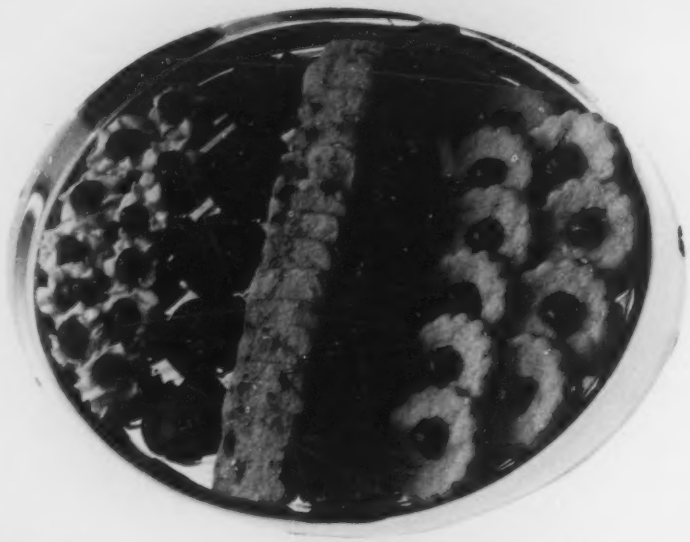

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R&I EXCLUSIVE

HOW THE SURVEY IS DONE

"Tastes of America" is a survey conducted annually for *Restaurants & Institutions* by National Family Opinion, a market research firm based in Toledo. The survey, in its eighth year, examines the habits, tastes and attitudes of Americans when they eat away from home. Respondents were asked to consider the patterns of all household members when completing the questionnaire.

This year, 2,000 households, selected to conform with the country's demographic profile, were questioned by mail. The survey was mailed June 26 and replies were accepted until Aug. 12. Survey forms were returned by 1,404 households, a response rate of 70.2%.

Foodservice patronage in institutional settings such as hospitals and the military is not represented because only people who live at home were surveyed. Therefore, "Tastes of America" households report lower spending on and a lower percentage of meals away from home than is true of foodservice as a whole.

■ TASTES OF AMERICA

HOW AMERICA L♥VES TO EAT OUT

Consumers dine out more often and spend more money, R&I's exclusive Tastes of America survey reveals.

By Maureen Pratscher, Toni Lydecker, Jeff Weinstein and Lisa Bertagnoli

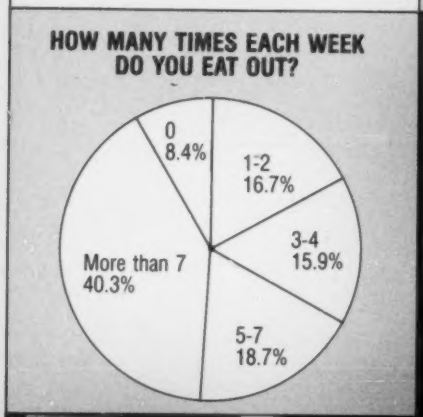
Restaurateurs weathered some difficult times in 1987, but the slump appears to be the result of an overbuilt industry rather than disenchantment with eating out on the part of consumers. *Restaurants & Institutions*' eighth annual "Tastes of America" survey reveals that 32% of Americans are eating out more frequently than they did last year. In addition, they are spending more on eating away from home, with the average household dishing out $31.07 a week, compared to $30.02 last year.

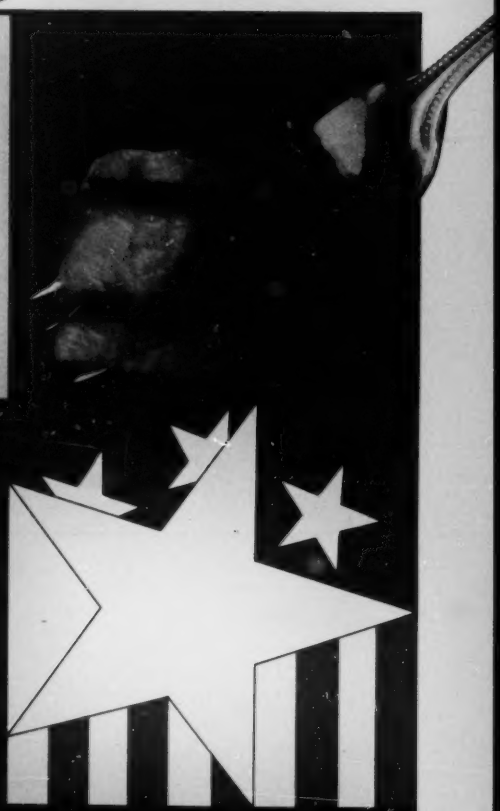
Fast-food hamburger chains are far and away the most widely accepted type of restaurant, earning visits from 68.3% of the respondents. Family restaurants and coffee shops were a distant second, patronized by 48.7% of the sample, and specialty restaurants, such as pizza, Oriental, seafood and Mexican, all rank in the top 10. Consumers tend to be loyal, visiting an old favorite restaurant 78.4% of the time, but can be most easily swayed to try a new restaurant at the suggestion of a friend or family member. A restaurant's reputation is the second most influential reason for trying a new place.

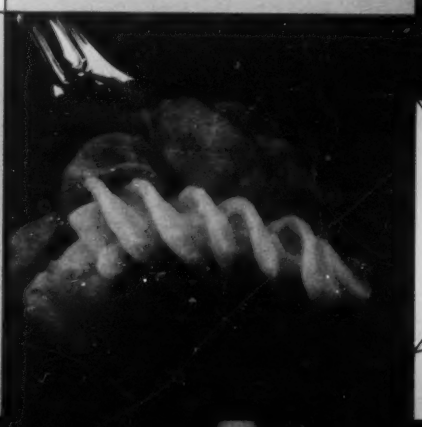
Restaurateurs who are battling for customers, however, should take note of some of the pet peeves aired by those surveyed. Smoking again tops the list of irritants, followed closely by noise or loud music, overpriced food and rude personnel. Even those operators who are grabbing a share of the red-hot delivery market must beware of the most common complaints: too-slow delivery, cold food and overpriced food.

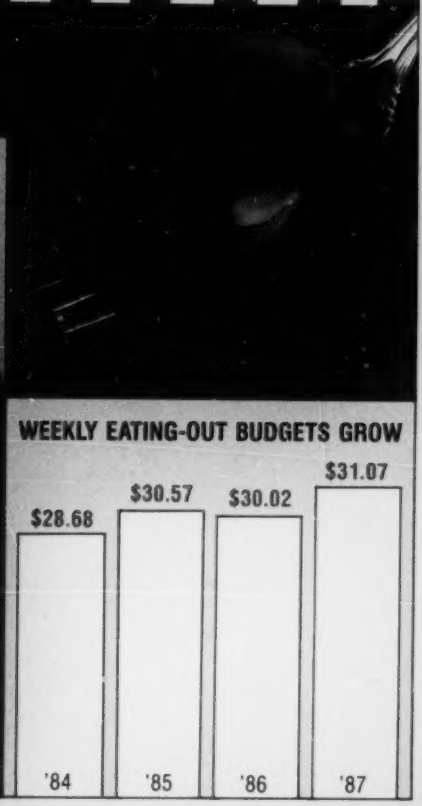
Convenience is a common refrain throughout the survey, as nearly 64% say they have purchased food for takeout in the past month, while 37% say they are preparing more frozen entrees in the microwave at home. In addition, nearly a quarter say they are purchasing more ready-to-eat food from supermarket delis and salad bars.

Americans are still keen on health and nutrition, with more than half the survey respondents endorsing the idea of restaurants offering low-sodium, low-cholesterol, low-calorie and low-sugar food. They are putting their money where their mouth is by ordering more chicken, fish and salad, all considered low-fat items, this year than last. Orders of diet soft drinks and decaffeinated coffee also are rising.









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TASTES OF AMERICA

Consumer habits: Dinner surpasses lunch in frequency, and more are trying breakfast.

Like sending clothes to the Laundromat, hiring a maid or owning a VCR, eating out was once a luxury that many now consider a necessity.

Of the people in this year's "Tastes of America" poll who said they ate out once in the past week, 40.3% said they or members of their household eat a meal away from home more than seven times a week.

Who eats out depends on a number of things, including sex, income, marital status and geographic location. Are too many females trying to be Superwoman? This year, for the first time, female heads of households eat out more than their male counterparts. Of that group, 79% eat out at least once a week, eat dinner out most often, and spend more than an average of $16.16 a week eating out. Male heads of households follow close behind: 66.5% of those surveyed eat out at least once a week (mainly dinner) and spend an average of $21.02 a week on food away from home.

Children and teen-agers spend some of their allowance on meals out. Of the households surveyed, 35.9% of the teen-agers involved eat a meal out each week, and that meal is most likely to be dinner. Only 22.6% said they eat lunch away from home: Either brown-bagging is back in style, or those surveyed did not realize that a school-cafeteria lunch is considered a meal away from home.

Money matters prevent some groups from eating out whenever it's convenient. For instance, 90% of single people with a child under 19 eat out at least once a week, but spend less than $22 a week on meals away from home. Of older retired couples and older singles, 83.6% eat out more than once a week, but spend less than $25 a week on meals away from home. In other words, there is a big market for senior-citizen discounts and menus.

At the other end of the scale are "career couples" with or without children. Those without children spend more than $36 a week eating out. Those with children under 19 years old spend $38 a week for the total household.

Those who can afford to spend money out do. Of the households earning between $45,000 and $59,999 a year, 98.1% said they eat out at least once a week. Of the $60,000-plus crowd, 95.7% said they eat out at least once a week.

Geographically speaking, restaurateurs in the West win. Of households in that region, 94.9% of the country eat out at least once a week, compared to 91.7% in the North Central, 90.5% in

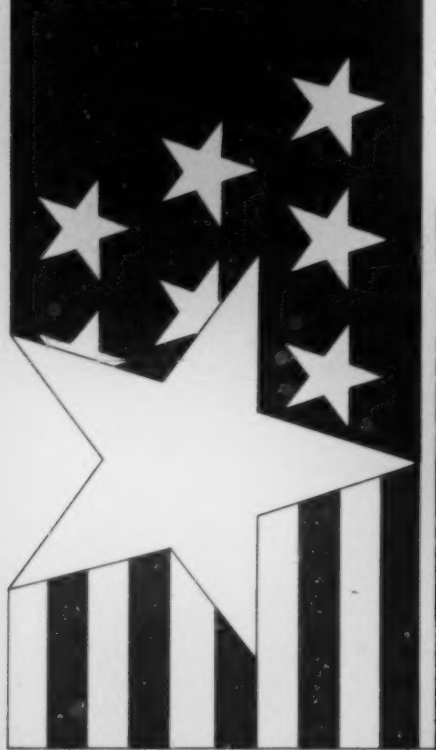
HOW DO YOU FEEL ABOUT THE COST OF EATING OUT VS. GROCERIES?

★ Young, unmarried male, low income, Detroit: "It's at least half again as expensive to get the same quality meal at a restaurant as you can have at home."

★ Young, unmarried male, low income, Chicago: "I eat out as a special thing, or for convenience when I have an appointment and don't have time to make dinner at home."

★ Middle-age, middle-income female, New York: "I accept the cost of eating out. You have to pay what the going rate is where you are, even though there may be a disparity. The quality of buying groceries and cooking at home is no better than eating out."

★ Retired male, middle-income, Port Richey, Fla.: "Actually, it's cheaper to eat at home, from an economic standpoint. But with two people, it's more convenient to eat out."



More and more meals away from home consist of supermarket takeout food.

Fine-dining takes first place when people are with friends or spouses.

the Northeast and 90% in the South Central.

Regardless of income, family structure or geographic location, opinions on the value of buying groceries and cooking at home versus eating out vary little. On the eating out end, the good news is that the percentage of those who think eating out is a poor value is dropping, from 31.3% in 1984 to 15% this year. Over the past five years, the percent of survey respondents who think eating out is a good value has varied only slightly, from a low of 8.8% to a high of 13.6% this year. The number of those who say eating out is an average value rose slightly, to 71.4% from 66.9% in 1986.

The high "average" percentages along with the dwindling "poor" percentages indicate that eating away from home has, during the past years, become an institution of sorts.

On the groceries side, the percentage of those tagging them a good, average, or poor value has varied only slightly during the past five years. This year, 20.2% say groceries are a good value, 65% say they are an average value, and 14.9% say they are a poor value. (Like those for eating out, the poor-value percentage has been dropping steadily over the years.)

Morning, noon and night

Dinner has replaced lunch as the meal most people eat away from home. In the past three years, lunch was the

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EATING OUT ON THE UPSWING

Actions speak louder than words: Consumers say they don't plan on eating out more, but the "yes" figure rises every year. All told, the numbers for present and future remain fairly steady.

	1983	1984	1985	1986	1987
Compared to previous year					
Eating out more	19.7%	28.2%	26.8%	28.3%	32.0%
Eating out the same	49.8	48.0	49.3	48.5	47.6
Next year compared to this year					
Will eat out more	10.1%	12.9%	11.2%	13.0%	12.2%
Will eat out about the same	73.8	71.4	72.6	73.2	73.9

EATING OUT VS. BUYING GROCERIES

The number of those who think eating out is a good value continues to rise, while the number of detractors declines. Feelings about groceries remain about the same.

	1983	1984	1985	1986	1987
Is the cost of eating away from home a . . .					
Good value	8.8%	10.0%	10.6%	12.2%	13.6%
Average value	59.9	60.2	69.6	66.9	71.4
Poor value	31.3	29.9	19.8	20.9	15.0
Is the cost of groceries a . . .					
Good value	17.2%	21.2%	18.0%	21.4%	20.2%
Average value	65.7	63.8	64.5	64.7	65.0
Poor value	17.1	15.0	17.6	14.0	14.9

DAD SPENDS MOST ON MEALS AWAY FROM HOME

Most age groups spend less than $25 a week on meals away from home. Single parents with children spend the least, while two-income couples with no children spend the most per week.

	Male head of household	Female head of household	Children/ Teens	Total household
Under $10/week	35.4%	45.6%	59.2%	23.4%
$10 to $25	40.0	39.8	31.0	33.2
$26 to $50	16.6	10.8	8.5	22.4
$51 to $75	5.2	2.8	1.2	12.2
More than $75	2.8	0.9	n/a	8.8

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TASTES OF AMERICA

WHICH MEAL ARE YOU MOST LIKELY TO EAT AWAY FROM HOME AND WHY?

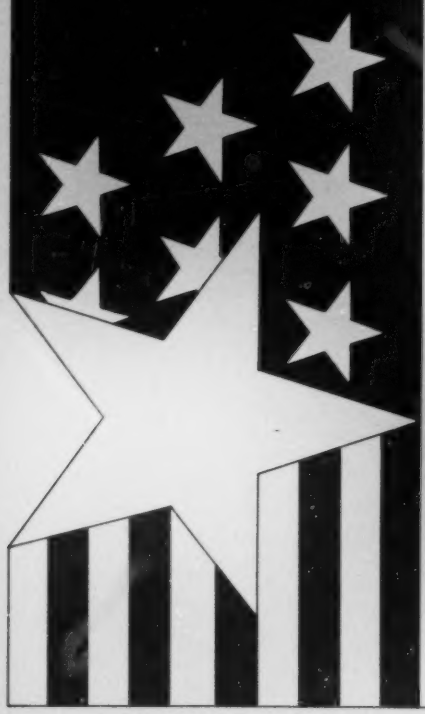
★ Single male, young, low income, Chicago: "Dinner, because that's a social time and because appointments sometimes keep me from making it home after work."

★ Single female, middle-aged, middle-income, New York: "Dinner, because most socializing is done in the evening after work, or on weekend evenings."

★ Single male, low income, Detroit: "Lunch, because when I'm out in the middle of the day, I'll stop and grab a bite someplace."

★ Retired male, middle-income, Port Richey, Fla: "I eat breakfast out at the doughnut shop. I don't eat much lunch, in or out, because I'm on a diet."

★ Older married couple, upper-income, New York: "Dinner, definitely. Especially on special occasions, or if we've just come back from a trip."



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favored meal eaten out most often, with dinner coming in a close second, and breakfast and snack occasions trailing. This year, 74.1% of all respondents say they or members of their family eat dinner out one or more times a week. Lunch comes in at 71.9%.

What people forego at lunch, they make up at dinner. In the competitive '80s, lunch is no longer the proper time to stay away from the office. Many working folk stay at their desks during lunch, or replace eating with a workout. More people socialize after work and on weekend evenings than during lunch. After a harrowing day in the corporate world, couples with or without children want to spend dinner time together and not worry about cooking or washing dishes.

Despite reports that the daypart is foundering, the number of people eating breakfast away from home has been steadily growing. This year, 35.8% said they eat breakfast out at least once in an average week, which represents a 15-point increase over last year. That breakfast may be a business breakfast at a hotel, coffee and doughnuts from a convenience store or muffins and juice from a chain.

Speaking of convenience stores, these newcomers to foodservice have not yet loosened fast-food's hold on American palates. Of the total households completing the survey, 68.3% said they most often eat in fast-food hamburger restaurants.

Coffee shop and family restaurants (48.7%), fine-dining (43.6%), pizza (40.3%), Oriental (31.6%), steak (28.3%), full-service seafood (28.3%), full-service Mexican (24.9%), cafeterias (23.9%) and chicken (23.6%) restaurants finished the list of Top 10 favorites. Country clubs, department stores and convenience stores trailed, although c-stores found a following in the $20,000 to $29,999 income bracket, and department stores found their niche with the $60,000-plus crowd.

People stay loyal to favorite eateries, though more are trying new places.

Fast food meets the everyday needs of the female and male heads of households and people with children. Special occasions, however, such as a meal with friends or with a spouse, are held at fine-dining or family restaurants.

Households with the highest incomes break the fast-food pattern. Those with an annual income of more than $60,000 a year say they most often take the family to coffee shops, not fast-food places. Why? Parents may think coffee shops, with their expansive menus, offer more healthful fare than typical fast-food outlets.

Older people, too, have their favorites. Older singles prefer coffee shops, cafeterias (good places to socialize, especially in retirement communities) and fine-dining restaurants to fast-food places. Older retired couples say they go to fast-food and coffee shops when they eat out. Older parents go with the

Fast food is tops with singles and families with children.

fast-food trend, followed by family dining.

Regional traditions hold true. Cafeterias, the successful chain concept only now starting to break into Northern territory, and fast-food chicken restaurants scored highest in the South Central area. Mexican and Oriental go over big in the West. Fine dining's hold is strongest in the Northeast (home of New York) and pizza is most popular in the North Central (home of Chicago).

Although most respondents have, through the years, stuck to tried-and-true favorites, the percentage of those trying new establishments continues to rise. The percentage of visits to a "new" restaurant rose to 21.6% of all eating-out occasions this year, up from 19.1% last year. Households that spend more than $50 a week on food away from home and that earn more than $60,000 a year try more new restaurants than those with tighter budgets. Respondents living in the Northeast, an

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FREQUENCY OF VISITING A 'NEW' RESTAURANT

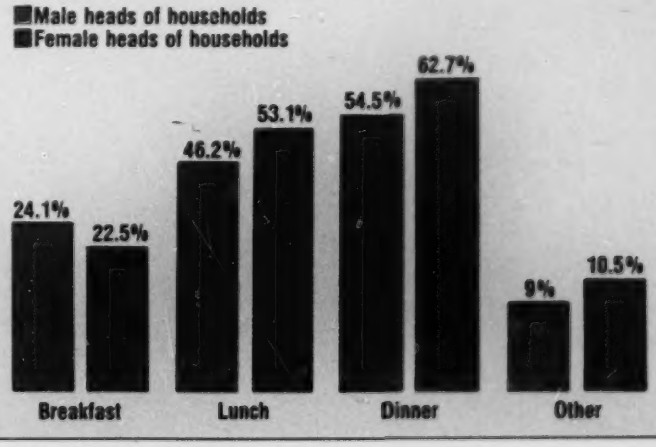
The big spenders and those in higher income brackets tend to be more adventurous. Northeasterners and Westerners try new places, too, because they live in climates where restaurants thrive.

	1983	1984	1985	1986	1987
Total	**18.2%**	**24.0%**	**18.3%**	**19.1%**	**21.6%**
By average weekly household expenditure for meals away from home:					
Under $10/week	16.6%	22.3%	13.7%	14.9%	21.5%
$10 to $25/week	17.3	23.3	18.5	18.5	31.7
$26 to $50/week	16.4	24.2	19.6	16.5	20.0
Over $50/week	20.5	26.7	19.5	n/a	25.2
By region:					
Northeast	22.6%	26.3%	20.9%	18.2%	24.6%
North Central	18.0	23.3	18.2	19.6	20.6
South	15.3	22.7	16.8	18.6	20.3
West	18.1	24.5	18.3	20.4	22.3
By annual household income:					
Under $12,500	n/a	n/a	n/a	18.7%	20.4%
$12,500 to $19,999	n/a	n/a	n/a	19.3	19.7
$20,000 to $29,999	n/a	n/a	n/a	18.1	21.1
$30,000 to $44,999	n/a	n/a	n/a	18.0	22.6
$45,000 to $55,999	n/a	n/a	n/a	21.4	23.4
$60,000 and over	n/a	n/a	n/a	22.8	26.1

DINNER IS MOST POPULAR MEAL FOR EATING OUT

Dinner has eclipsed lunch as the most popular eating-out time, as career people work through or work out during lunch. Breakfast continues to come on strong, as more Americans are eating on the run.

	1983	1984	1985	1986	1987
Breakfast	22.0%	22.4%	24.9%	23.8%	35.8%
Lunch	50.7	72.6	71.5	69.0	71.9
Dinner	64.7	66.2	67.7	66.6	74.1
Other	21.9	27.7	28.7	24.0	16.0



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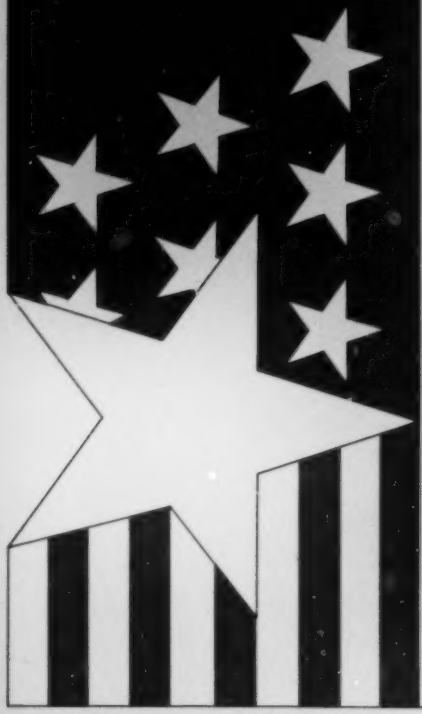
TASTES OF AMERICA

TAKING CARE OF BUSINESS

In 1986, 26.7% of the households surveyed ate a business meal during an average week. New tax laws may have caused the decrease this year.

20.3% eat a business-related meal in an average week.

79.7% do not eat a business-related meal in an average week.



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area which includes the restaurant-laden cities of New York, Boston and Philadelphia, try new restaurants more often than people living in other parts of the country.

Eating for profit

The percentage of those respondents who eat business meals may have peaked last year. In 1986, 26.7% of households said a member eats a business meal during an average week. This year, 20.3% said they eat business meals. New tax laws, or perhaps a trend to talk about business on the boat or the golf course may be responsible for the drop. This portion of the population is in the upper-income brackets: 52.7% of households that make more than $60,000 a year eat at least one business meal a week.

Most business meals take place in a fine-dining restaurant—46% of respondents said that is their venue of choice for such occasions. Those in the Northeast are even more likely to take a client to a fancy restaurant; those in the West are least likely to do so. Perspective may be responsible for this statistic: The West-Coast mentality may prohibit residents from calling fine dining by its name, although check averages probably rival those of New York's best white-tablecloth restaurants.

Western businesspeople are more likely to eat business meals than workers in other regions. The percentage for the West is 29.1%, followed by the Northeast at 22.2%, South Central at 18.1% and North Central at 15.3%.

Male heads of households eat more business-related meals than female heads of households, but not many more. Nearly 86% of the males said they eat one business meal a week.

Of the female heads of households surveyed, 84.5% eat a business meal during an average week. Compared to men, women shun morning as a time for business meals; 26.7% of the females said they eat business breakfasts.

Most business meals take place in fine-dining restaurants.

BUSINESS-RELATED MEALS BY INCOME

The higher the income, the more frequent the business meals. And most business meals take place at fine-dining establishments.

	Yes	No
Under $12,500	7.7%	92.3%
$12,500 to $19,999	13.4	86.6
$20,000 to $29,999	18.1	81.9
$30,000 to $44,999	24.7	75.3
$45,000 to $59,999	36.8	63.2
Over $60,000	52.7	47.3

Business meals consumed during various dayparts:

Breakfast	51.6%	Lunch	92.4%
Dinner	87.0	Other	19.9

Looking ahead

This year, 32% of those surveyed said they are eating out more, 47.6% said they are eating out the same, and 20.4% said they are eating out less. Only young singles (hooked to the VCR?) and retired couples are saying they now are eating out less often.

But saying no to eating out is like making a New Year's resolution: It sounds good, feels good and is soon forgotten. Year after year, the bulk of survey respondents (73.9% this year) say the plan to eat out no more next year than they did this year. Only a small percentage (12.2%) say they will eat out more. Yet every year, the percentage of those who say they are eating out more rises.

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TASTES OF AMERICA

Food preferences: Chicken, fish, hamburgers and breakfast sandwiches gained ground.

Baked potatoes, with a variety of toppings, are a popular entree.

Without question, beef has a loyal clientele. Nearly 69% of consumers responding to *R&T*'s "Tastes of America" survey eat it more than once a month, while only 65% eat chicken that often. On other fronts, chicken pulled ahead. Slightly more people ate chicken than beef last year. Even more significantly, 33.3% are ordering chicken more often this year than last, compared to 19.1% for beef.

Also on the fast track is fish, now accepted almost universally; about 87% of the consumers ate fish at least once last year. Once they try it, they like it, as indicated by the fact that 33.6% are ordering fish more frequently.

Veal and lamb are favored by a small but well-heeled group of consumers. Most people making less than $12,500 a year bypass those meats, but of households earning $60,000 or more, 42.2% ordered lamb and 53.3% ordered veal last year.

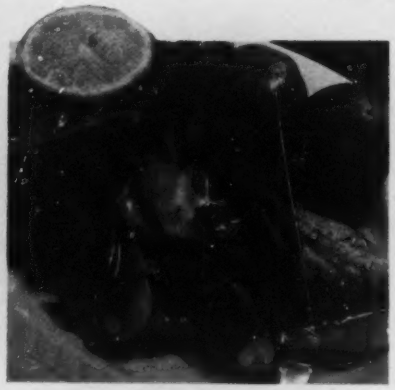
They want it fried

Although people might think they're skimping on calories by ordering poultry or fish, their choice of cooking methods might mean the opposite. The five most popular methods of cooking meat require little or no additional fat. In contrast, deep-frying scored highest

COOKED TO ORDER

Consumers voiced strong opinions about the cooking of their entrees. They'll order meat cooked with little or no additional fat, but deep-frying is preferred for poultry, fish and shellfish.

Poultry		Meat		Fish		Shellfish	
Baked/ roasted	52.4%	Broiled	54.3%	Deep-fried	42.7%	Deep-fried	47.2%
Deep-fried	35.7	Grilled	52.9	Broiled	38.5	Broiled	18.2
Broiled	27.3	Baked/ roasted	39.0	Baked/ roasted	22.3	Stir-fried	13.2
Grilled	21.2	Stir-fried	18.2	Sautéed	17.3	Sautéed	12.6
Stir-fried	17.7	Mesquite grilled	15.9	Grilled	16.5	Poached	5.8
Sautéed	12.0	Sautéed	12.6	Poached	9.5	Baked/ roasted	5.3
Mesquite grilled	7.5	Deep-fried	7.9	Blackened	8.5	Grilled	5.3
Poached	2.8	Blackened	4.7	Mesquite grilled	4.6	Mesquite grilled	2.1
Blackened	2.0			Stir-fried	4.1	Blackened	1.5



One-third of consumers are eating fish more often these days.

for fish and shellfish and second highest (after baking/roasting) for poultry.

Consumers from the South Central region, home of Cajun cooking, like to eat blackened fish. People from other parts of the country are more adventurous, ordering blackened meat, poultry and even shellfish. Mesquite grilling is also subject to regional taste, scoring highest in the West for everything but fish.

A great way to eat beef, say consumers, is in the form of a patty. All but about 11% of those surveyed ate hamburgers last year, and three-quarters had them more than once a month. Nor is the national appetite for burgers approaching satiation, for well over 25% ate them more often this year. The gourmet burger boom of several years ago shows no sign of rebirth—demand is significantly lower for specialty burgers than for the mass-produced kind.

Nearly 80% of the consumers ordered steak last year, placing it second in the beef category. A special-occasion meat, steak is ordered only half as often as hamburgers.

Seventy-two percent of consumers ate fried chicken last year. Nuggets, which are also fried, scored second. Less than 40% chose the next most popular chicken dish, grilled/broiled chicken. Ranking lowest were chicken wings and patties.

Youth line up for fast food

As a demographic group, young singles show a strong preference for fast food—french fries, burgers and pizza top the list of foods they ordered last year. Middle singles like salads, beef

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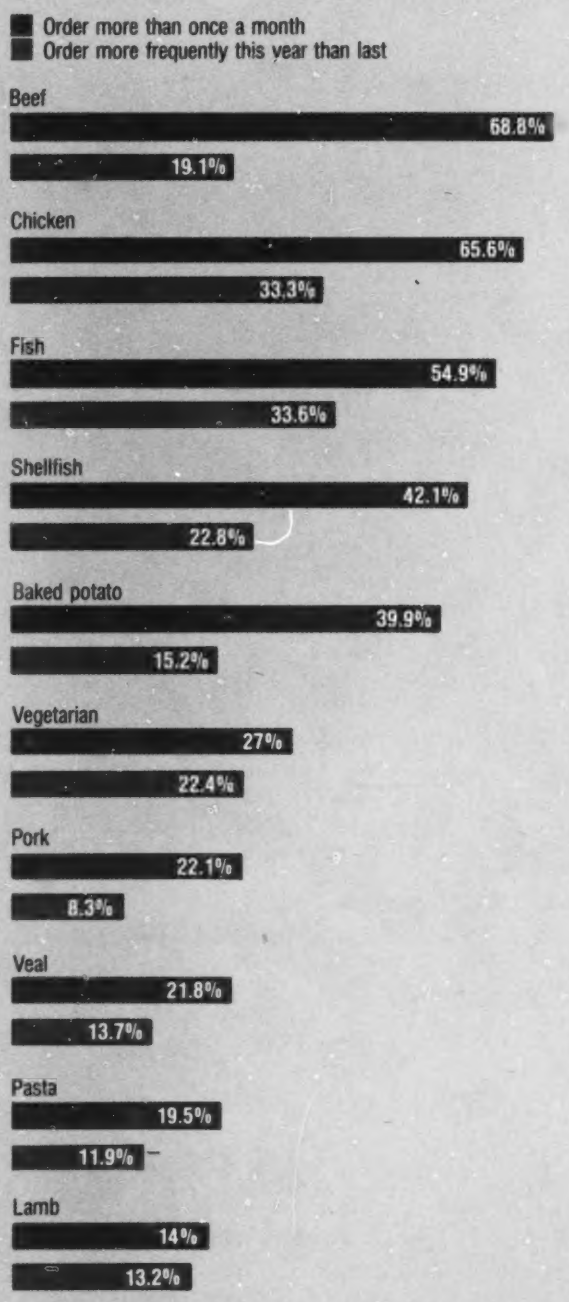
TOP-OF-MIND ENTREES

Month in and month out, beef is ordered most often. But when asked which entrees they're ordering more frequently this year than last, more consumers pointed to chicken and fish. Comers are shellfish and vegetarian entrees; more than 20% of consumers say they're ordering them more often. Baked potatoes remain a popular substitute for animal protein, but future growth in demand may be slow.



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TASTES OF AMERICA

ARE YOU ORDERING ANY MENU ITEMS MORE OFTEN THIS YEAR THAN LAST?

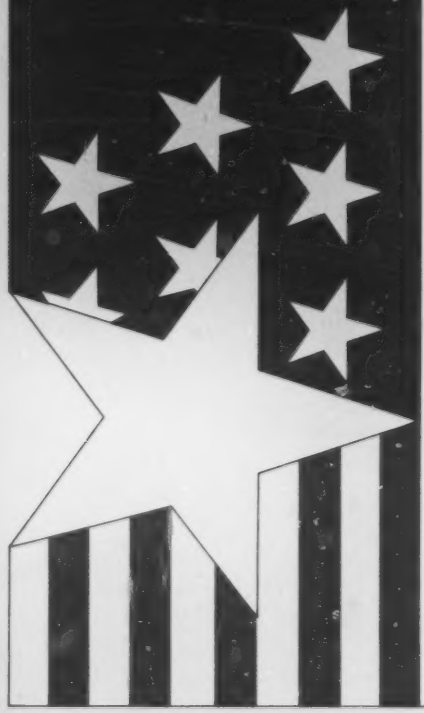
★ Older married couple, retired, middle income, Port Richey, Fla.: "Our ordering habits don't change much from year to year. We're not fad people—our favorite dinner is roast beef."

★ Young family of six, affluent, St. Louis: "My husband is eating more chicken and fish because he has high blood pressure."

★ Young single male, low income, Detroit: "I'm picking up more muffins and breakfast sandwiches on the way to work."

★ Older married couple, retired, affluent, Summit, N.J.: "We're eating more Cajun food—my wife is from Louisiana and it reminds her of home. We're also ordering more fish, Oriental food and gourmet ice cream."

★ Young family of four, affluent, Dallas: "As our children get older, they're moving from hamburgers to chicken and eating more salads."



WHO LOVES ETHNIC FOOD?

As long as it's ethnic, Westerners will order it. Last year they were the most likely to try Oriental, Mexican and French food. Italian was big in the Northeast, and the South Central region voted for Tex Mex.

	Total	North-east	North Central	South Central	West
Italian	70.1%	81.3%	65.7%	63.4%	75.7%
Oriental	62.3	67.6	55.2	57.6	74.3
Mexican	54.9	34.5	56.4	50.8	80.0
Cajun	16.6	12.2	13.8	23.1	13.6
Tex-Mex	15.3	12.9	9.9	22.3	12.9
French	13.8	20.1	8.3	8.8	22.9

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and chicken best, while older singles are fond of chicken and vegetables.

The connection between youth and fast food also holds true for young couples, who are most likely to order pizza, chicken and french fries. The ordering patterns of older working couples, on the other hand, reveal an emphasis on salad, chicken and fish.

The tendency of people to lighten up their diets as they grow older is less clear cut in the case of families with children. For parents of all ages, hamburgers were among the top three foods their families ordered last year; pizza and french fries were popular, as well. But the families also ordered fish and salads. The data suggest different eating habits within the same family, with the children ordering fast food and the parents opting for lighter entrees.

Italian tops the ethnic list

More than 70% of the survey respondents ordered Italian food last year. Home delivery and takeout ranked high for this kind of ethnic food, reflecting the continuing popularity of pizza.

Oriental food was a strong second—62.3% ate it last year—and, again, consumers often chose delivery or takeout. The consumer's perception that pizza and Oriental food hold up best to a delay between ordering and consumption may be boosting total orders for these ethnic food categories.

Twenty percent of "Tastes of America" consumers say they're ordering more Oriental food this year than last and, at 19%, Cajun wasn't far behind. Although interest in Tex-Mex has flagged, people are showing a lively interest in Mexican specialties. If Western tastes are the harbinger of the future, watch for growth in takeout sales for Mexican food; 33% of Westerners took it out last year.

French food continues to hold a small but elite corner of the ethnic food market. Despite all the news about moderate-priced bistros, much of the public still thinks French food is beyond their means. Only 7.7% of people with incomes below $12,500 tried French cuisine last year, compared to 35.6% of those whose incomes exceeded $60,000.

In terms of specific ethnic foods, pizza was the clear winner. More evidence of pizza's high convenience rating: Nearly half of the people who

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Convenience and good taste keep pizza orders coming in.

TASTES OF AMERICA

DO YOU USUALLY ORDER DESSERT?

★ Young single male, low income, Detroit: "Sometimes. I'm more likely to order it at higher-dollar establishments. It's more relaxed."

★ Young family of six, affluent, St. Louis: "We always order dessert, except in fast-food or Oriental restaurants. My favorites are cheesecake and cheese with fruit."

★ Older married couple, retired, affluent, Summit, N.J.: "We eat dessert at home, but not when we eat out. Restaurants serve such large portions that we don't have room."

★ Young family of four, affluent, Dallas: "Sometimes the children order ice cream. My husband and I order dessert only when it's a fancy restaurant."

★ Older married couple, retired, middle income, Port Richey, Fla.: "A meal isn't complete without dessert. My favorite is some kind of pie, usually without ice cream."

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ordered pizza last year had it delivered. About a quarter of the respondents had tried gourmet pizza, but they must not have been very impressed; only 10.9% are ordering it more often, compared to 31.7% for the pizza segment as a whole.

Pizza consumption is consistently high throughout the country and some Mexican foods also are on the way to becoming mainstream menu items. More than 40% of respondents ate taco salads last year, with consumption lagging only in the Northeast.

Demand for other ethnic foods varies significantly according to geographic region. In the western part of the South Central region, for example, 45.8% of consumers counted fajitas among last year's food experiences; in contrast, only 5.4% of New Englanders had tasted the Tex-Mex invention.

Steady growth for diet and decaf

More people drank soft drinks than any other beverage last year: 75.4%, followed by iced tea at 66% and regular coffee at 63.8%. Young people are especially fond of the fizzy stuff. Even diet soft drinks, which might seem to be the natural accompaniment to the salads and other low-fat items favored by older people, are more acceptable to the younger generation.

Better than 20% of the consumers are drinking more decaffeinated coffee—about twice the percentage that have upped their consumption of regular coffee—and people expressing that preference are concentrated in the middle to upper age ranges. This finding is reinforced by a National Restaurant Association survey concluding that older people try harder to avoid caffeine.

Decaf appeals to older customers, soft drinks to younger ones.

Remember when wine was an esoteric drink ordered only by sophisticated diners? Last year, 44.1% of the *R&I* consumers ordered wine—a higher percentage than for any other alcoholic beverage. Capturing 42.8% of positive responses, beer and spirits tied for second place. But people still order wine a little less frequently than the other two alternatives—it's more of a special-occasion drink. Don't expect much of a climb in beverage sales; fewer than 10% of the consumers are ordering any alcoholic beverage more often this year.

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THREE BIG BEVERAGES

Soft drinks are the preferred beverage of the younger generation. Interest in iced tea and coffee peaks during the middle years, then declines as people monitor their caffeine intake more carefully.

Percentages below refer to beverages ordered by the head of household.

Soft drinks		Iced tea		Regular coffee	
under 30	90.0%	under 30	67.0%	under 30	56.0%
30-39	87.4	30-39	73.5	30-39	62.3
40-49	83.2	40-49	63.1	40-49	68.5
50-64	73.2	50-64	70.7	50-64	71.3
65 & older	40.1	65 & over	55.3	65 & older	57.4

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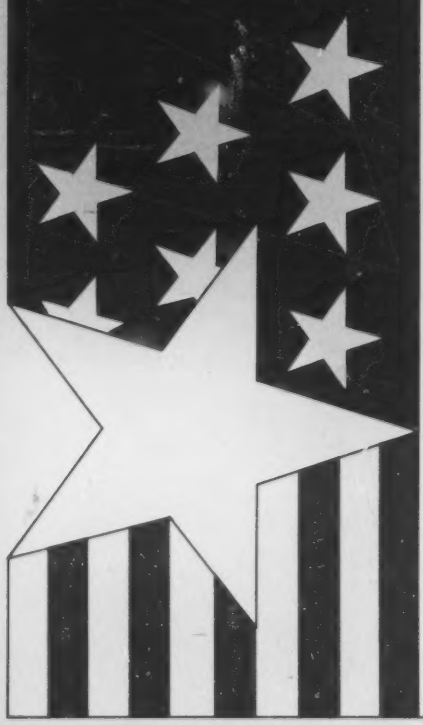
TASTES OF AMERICA

TAKING SIDES

Which side dish do Americans like best to accompany an entree? The people's choice would make their moms proud: vegetables. And they made no bones about liking their potatoes baked.

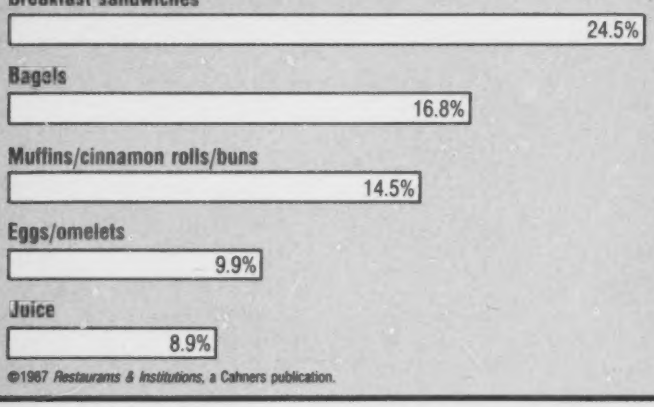
Vegetables	79.1%
Baked potato	79.0
Fruit	47.5
Rice	42.2
French fries	39.2
Pasta	24.3
Potatoes (prepared other ways)	21.0
Stuffing	17.0



BREAKFAST ON THE RUN

Americans are discovering that they can eat a breakfast sandwich with one hand, while driving with the other. Growth potential is excellent, for only 43% of "Tastes of America" consumers have tried this item.

Order more frequently than last year



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Breakfast, sides and sweets

To start their day, many people continue to eat the classic American breakfast—two-thirds ordered eggs last year, while half ate muffins, cinnamon rolls and buns.

But they're also learning to put it all together in the form of a breakfast sandwich, which is far easier to pick up at a takeout counter or drive-thru. The sandwiches are particularly well-liked by the young, suggesting a tie-in with the popularity of soft drinks among this age group.

Vegetables are popular not only in entrees, but on the side. In general, enthusiasm for vegetables correlates to higher household income. The myth that pasta is a yuppie food may contain some truth, for 40.4% of people making over $60,000 a year ate it last year, compared to only 17.8% of those earning less than $12,500. On the other hand, people earning a modest income were almost twice as likely to choose stuffing as a side dish.

About three-quarters of the consumers succumb to the urge to eat dessert at least once a year. In general, older consumers are more likely to skip dessert; only 60.3% of households in which the head was over 65 years of age ordered dessert in restaurants last year, compared to 82% of the under-30 set.

Single people follow this pattern most closely, phasing out dessert as they grow older and, presumably, more weight-conscious. But a high proportion of older working couples and parents continue to order dessert in restaurants—perhaps to pamper themselves during moments of respite from the pressures of working and raising a family. People who eat out frequently or eat business-related meals are also more likely to indulge themselves with a sweet at the end of the meal.

The breakfast sandwich: Served on a plate or in a fast-food bag.

For information circle 19

TASTES OF AMERICA

Consumer attitudes: Diet remains a dilemma, while shifts toward convenience continue.

Almost 20% fewer survey respondents than last year report being more concerned with nutrition.

In this era of movers and shakers, this period of increasing consumer sophistication, this age of information, foodservice has had to adjust.

No longer is dining out considered just a luxury or a special occasion. It has become a way of life. And because consumers have become so comfortable with that notion, they have also become more demanding. Convenience, speed of service, quality, comfort and concern are what the customer expects.

This year's "Tastes of America" survey also asks consumers why they eat out, what influences their choices, what irritates them and in what ways their ordering habits have changed.

The diet dilemma

Do Americans want to eat smart when they eat out? Or do they just want nutritious options to satisfy their guilty consciences? After studying survey results, the answers to these questions remain clouded.

Compared to 1986 results, 19% fewer respondents are concerned with nutrition. Does that mean they are not as concerned about what they eat? Or does that mean they now know how to maintain a healthful diet and do not have to give it as much thought? Or maybe consumers feel that operators are more health-conscious and can count on more healthful options and more nutritious cooking techniques.

Fully 21% fewer respondents are eating smaller portions and 27% less are eating fewer meals. But at the same time, 17% more respondents say they are ordering appetizers and salads as a meal rather than ordering entrees. Confusing?

The survey also shows nutrition concerns are highest among households with annual incomes over $60,000. Smart money must make smart eaters because concern drops 15% to 20% among those in the $45,000 to $59,999 income group. Concern is below average in the Middle Atlantic region and, surprisingly, in the Pacific region where sprouts and tofu gained their prominence. But perhaps concern is not as great there because consumers know they can expect healthful options when they dine out.

The survey also reveals that young singles, who work out more often and have yet to experience the midsection spread, show the least concern for nutrition. Also, singles eating smaller portions falls 40% below average. But singles who say they are eating fewer meals are more than 50% above the average survey result.

It appears that advertisers of fast food and sweets are doing a good job reaching children. Among married couples working full-time, 38.9% with children under 19 are concerned with nutrition, compared to 65.9% for working couples without children.

Convenience crazy

Growth in takeout, drive-thru, supermarket deli and home-delivered prepared food continues unabated in the foodservice industry.

Drive-thru sales show the biggest increase in this year's "Tastes of America" survey. When asked if they have purchased ready-to-eat food in the past month, 57.8% of the respondents reported using a drive-thru, compared to 48.4% in 1986. Takeout remains the overall leader at 63.4%, up from 62.4% in 1986. Home delivery jumped from 19.6% to 24.7%. Supermarket deli purchases increased from 42.6% to 43.2%, while those buying prepared food at a gourmet shop in the past month increased from 7.7% in 1986 to 9.6% in 1987.

The convenience orientation appears to be lagging behind in the Northeast. The tradition of sitting down to eat as a family or couple appears alive and well there. When asked if they have purchased ready-to-eat food in the past month, consumer answers are below the average for takeout, drive-thru and delivery. However, this densely populated area does make more frequent purchases at convenience stores.

In the North Central and South Central regions, where the climates are extreme, consumers seem to favor drive-thru systems, as 65% report purchasing there in the past month vs. a 58% average. Out West, where the trends of tomorrow start, consumers favor supermarket delis and gourmet shops. Fifty-one percent in the Mountain region have made supermarket deli purchases in the past month, compared to a 43% average. In the Pacific region, 14% of consumers have visited gourmet shops in the past month, while the average stands at 9.5%.

Time is money, more so among affluent

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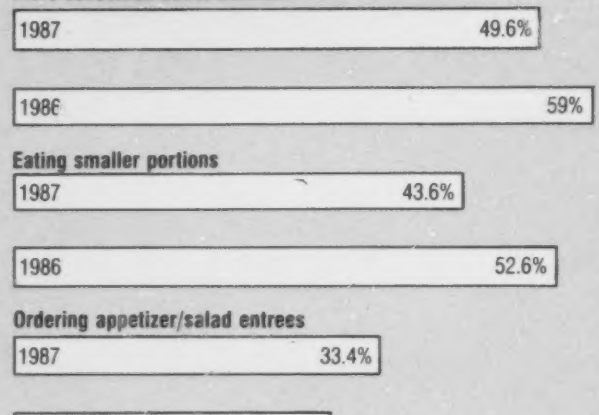
Those age 40 to 49 want more items low in sugar.

THE DIET DICHOTOMY

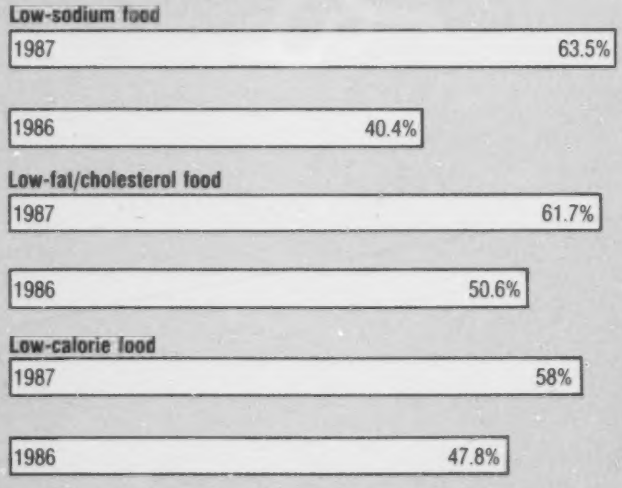
Are American consumers more concerned about nutrition? All the latest surveys would indicate "yes." But there is a minority who say the nutrition trend is more lip service than fact. From results of the "Tastes of America" poll, maybe they are right.

How eating habits have changed in the past year.



But consumers increasingly feel operators should offer more nutritious food. They do want the option.

Which items should restaurants offer customers?



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TASTES OF AMERICA

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ent consumers. This group has really taken to the convenience craze, scoring above-average monthly visits in all categories. Fully 71% report buying takeout in the past month.

The survey also asks how consumer ordering habits have changed in the past year. The results are as follows: 24.8% are buying more prepared food at the supermarket deli/salad bar; 20.4% are purchasing more food for takeout from restaurants; 10.5% are ordering more food for home delivery; 7.3% are buying more ready-to-eat food bought at convenience stores; and 5.3% are buying more prepared food at gourmet shops.

The restaurant industry's latest competition, the microwave oven, continues to score points with consumers, especially as food manufacturing operations improve the quality and quantity of microwavable products. Thirty-seven percent of survey respondents report preparing more frozen entrees in a microwave at home. That figure jumps to more than 40% on the West Coast and 48% among respondents earning

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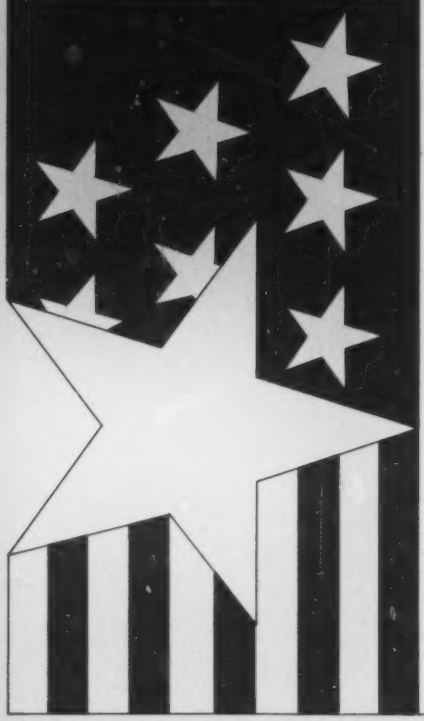
Purchases for takeout from restaurants are strongest in the South Central region.

HOME DELIVERY DRAWBACKS

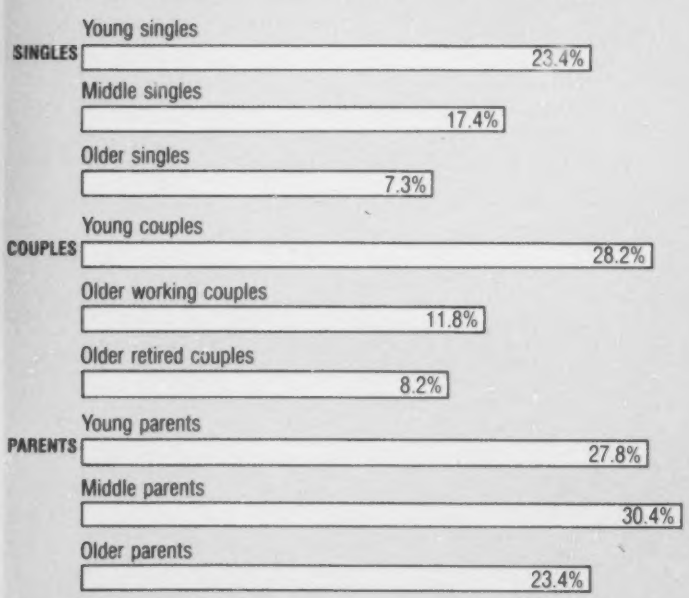
Consumers indicate what type of home delivery problems they have experienced most often.

Never experienced problem	43.8%
Delivery too slow	27.4%
Cold food	24.2%
Prices higher than restaurant	24.0%
Not enough menu variety	11.3%
Hidden delivery charge	8.0%
Container falls apart	5.7%



WHO ORDERS FOOD FOR TAKEOUT?

Middle-aged parents, a group likely to be a double income-producing family, reported purchasing more takeout on a monthly basis than any other group of consumers.



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TASTES OF AMERICA

HOW HAVE YOUR EATING HABITS CHANGED IN THE PAST YEAR?

★ Older, married couple, affluent, New York City: "Because many restaurants serve such large portions, we are more careful about how we order. Now we may skip a course."

★ Middle-age, single, female, middle income, New York City: "I'm eating lighter meals and more salads. I have a daughter who is extremely weight-conscious so we pay more attention to calories and nutrition."

★ Retired couple, fixed middle income, Port Richey, Fla.: "We eat quite a few prepared foods at home. We're getting about the same amount of takeout. I like to pick up Chinese or pizza—we don't get it delivered. Once in a while I get eggplant Parmesan from the pizza place."

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more than $60,000 a year.

I know, let's go out

As the number of single adults continues to grow and with the growing need for double-income families to make ends meet, the increasing answer to the question of what to do for dinner, or even breakfast and lunch for that matter, is "Let's go out." When the survey asks what is the main reason why consumers go out to eat, the No. 1 answer is because they do not want to cook.

More than 68% of the respondents in the $60,000-and-over income bracket give that response, compared to 49% in the under-$12,500 bracket. When measuring household size, 73.5% of families of four do not want to cook, compared to 60% for families of five or more. Only 38% of older-singles cite not wanting to cook as their motivation to eat out.

Convenience ranks fourth among reasons why consumers eat out. It is a driving factor among young singles and heads of households age 30 to 39. But convenience is key for only 23% of older singles and retired couples.

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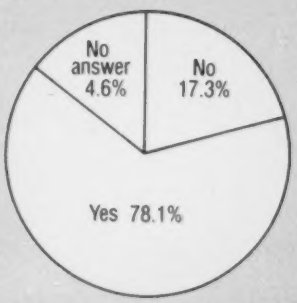
INCREASING PRESSURE

Most consumers are interested in ingredient labeling at fast-food restaurants. The greatest concern comes from Middle-Atlantic residents, the least from Mountain region residents.

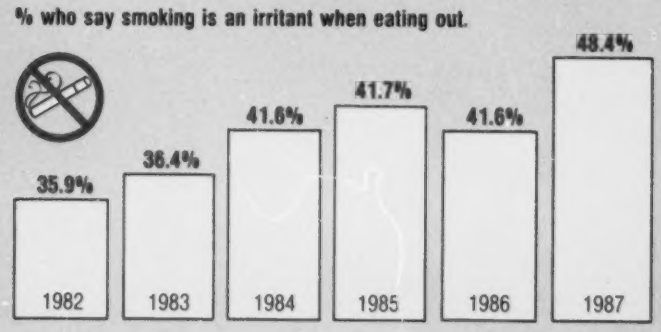
Should ingredients be listed for foods bought at a fast-food chain?



THE SMOKING ISSUE

Smoking is becoming an issue with consumers, and between local governments and operators. It remains the No. 1 irritant to consumers in the Mountain region of the country and to those between 30 and 39 years old.

% who say smoking is an irritant when eating out.



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TASTES OF AMERICA

HOW HAVE THE ORDERING HABITS OF MEMBERS OF YOUR HOUSEHOLD CHANGED?

★ Middle-age, family of four, affluent, Dallas: "With the kids getting older we are eating more 'grown-up' foods. We are having pizza delivered more often now."

★ Young, single, male, low income, Chicago: "I'm eating more supermarket deli salad bar meals."

★ Young, single, male, low income, Detroit: "I'm ordering more takeout because it's convenient. Since I'm in school and have to prepare my own meals, takeout has become an attractive alternative."

★ Middle-age, family of six, middle income, St. Louis: "We don't buy prepared food at the supermarket or convenience stores. We do microwave products, but we don't buy things specifically for the microwave."

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When it comes to choosing a restaurant they have never been to before, consumers show a lack of trust in advertising claims because 65% of the survey respondents say they are influenced most by suggestions of a friend or family member. A friend's recommendation is most important to 71% of young singles and 75% of those who spend more than $50 a week dining out.

The adage about word-of-mouth being the best form of advertising is true more than ever today. A restaurant's reputation is becoming increasingly important to consumers choosing a new restaurant. This year, more than 45% say reputation influences their decision, compared to 27% in 1986. Reputation is important to 60% of respondents living in the Southeast, compared to 35% in the Mountain region.

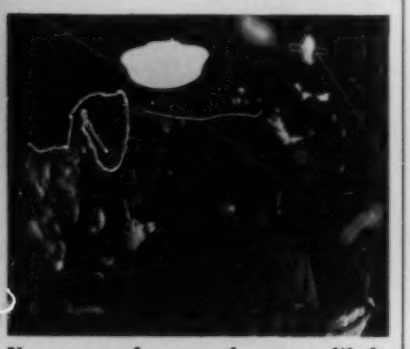
Interest in coupon-clipping remains strong as 30% say coupons influence new restaurant choices, compared to 19% for price discounts. Coupons are most popular among economically strapped heads of households aged 50 to 64 and single parents with children under 19.

Since restaurant reviews tend to concentrate on upscale operations, they influence just 14.4% of the total response. More than 30% with incomes greater than $60,000 are swayed by reviews. But reviews are important to only 8.4% with households of five or more and 7.3% of older singles.

Also, about 10% of the respondents say a choice of a new restaurant is influenced by a television advertisement where they can see the product, compared to only 4.3% for a radio ad.

Where there's smoke, there's fire

Once a restaurant captures customers, the next important task is getting them to come back. Catering to their needs and making sure irritations are kept to a minimum is paramount to success. And surprisingly, young customers are irritated much easier than their elders.



Young couples are the most likely group to try a new restaurant.

Compared to a 43% average, only 24% of retired couples will eat out for the convenience.

While smoking continues to be the greatest nuisance to customers, noise and loud music, price/value, and rude or unfriendly personnel rank close seconds.

Smoking is most offensive to "back-to-nature" Mountain region respondents (61%). Almost 65% of young singles are irritated by smokers, compared to only 40% of middle singles and 44% of older respondents, who grew up when smoking was more acceptable.

The younger the respondent, the more cost-conscious and the greater concern with price/value. About 57% of heads of households under age 30 are irritated by high prices, compared to only 34% of those over age 65. Price/value also increases in importance as income level rises.

Rude and unfriendly personnel bothers 66% of young customers, compared to only 20% of older customers.

Some characteristics that do not bother customers as much in 1987 as they did in 1986 include: waiting in line for food (26.9% vs. 36.4%); lack of cleanliness (25.1% vs. 40.4%); portions too small (18.4% vs. 23.4%).

Golden Pan Pizza is back.

stitutions' "400," Wendy's last year had about a $500 million lead on Hardee's.

It's Back: Golden Pan Pizza Returns to Pizza Hut

Like wheat fields in late summer, some Midwestern Pizza Huts have taken on a golden color. Golden Pan Pizza, the chain's product variation with the whole-wheat crust, has again appeared on menus.

This marks the second time Pizza Hut has brought out the specialty pizza. "By and large, we've decided that it's similar to a Taco Pizza or a Barbecue Pizza," says Mike Jenkins, Pizza Hut director of public relations. "What we'll do is bring it out for a limited time and get the initial sales bumps. When sales level off and get to the point where it doesn't make sense to keep it any more, then we'll take it off."

Because Pizza Hut describes the pizza varieties as limited-time offerings, Jenkins says the chain has not experienced any backlash from removing the products from the menu.

He says in areas where Taco, Barbecue and Golden Pan Pizza do very well, there is the option to keep the product on the menu after the intended time deadline expires.

Bakers Square Adds More Pitas to the Fold

The chain best known for its pie has expanded its line of pita sandwiches. Bakers Square has brought out the Chicken Fajita Pita, Philly Beef Pita and the Stir Fry Shrimp Pita.

Bakers Square, which is owned by Vicorp Restaurants Inc., Denver, had been featuring its hamburgers—Burgers for Grownups—during the summer. ***—Brad Stratton***

■ R&I DATA

AVERAGE MENU PRICES: SANDWICHES MEATIER

R&I tracks average selling prices for a variety of menu items at restaurants across the country. The latest survey results show the average price for sandwiches up almost 20% over the past six months. But the price of chicken patty sandwiches has fallen as much as 20%.

Item	Full service	Fast food	Hotel/ motel	North-east	South	North Central	West
Beverages:							
Coffee	$.55	$.51	$.87	$.62	$.62	$.67	$.67
Iced tea	.64	.65	.93	.81	.69	.76	.73
Soft drinks	.67	.67	1.01	.87	.69	.78	.76
Beer	1.25	1.18	1.96	1.75	1.55	1.67	1.63
Wine (glass)	1.51	1.50	2.36	1.96	2.19	1.85	2.09
Sandwiches:							
Hamburger	2.60	1.49	5.03	3.34	2.68	3.30	3.58
Cheeseburger	2.88	1.71	5.24	3.53	2.70	3.61	3.76
Ham & cheese	2.60	2.54	4.57	3.54	2.70	2.68	4.21
Club	3.77	3.66	5.35	4.75	3.74	4.97	4.80
Fish	2.56	1.95	4.50	2.75	2.77	2.20	3.63
Chicken patty	2.54	1.97	4.12	2.34	2.85	2.94	2.93
Other:							
Chili	1.64	1.44	2.66	1.92	2.00	1.53	1.67
French fries	.88	.78	1.11	1.03	.86	.90	.93
Scrambled eggs	1.32	1.27	3.34	2.22	2.42	2.03	2.75

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■ TESTINGS

Wyatt Cafeterias' first carryout shop is doing outstanding business. Debra Hand, director of marketing for the Dallas chain, says the Fort Worth, Texas, location is especially well-suited for carryout. Additional Wyatt's Carry-Out Food Shoppe units, which are located within regular Wyatt Cafeterias, are being considered. The Fort Worth site also is being used to test Wyatt's Blue Bell Ice Cream Stand, which offers both dine-in and carryout ice cream. The chain has 118 cafeterias in nine states.

Spangles is testing the Vanilla Delights and Sundae Bar in its 10th store, which is located in Wichita, Kan. The bar comes with vanilla ice cream and a choice of 10 toppings. A Vanilla Delight is ice cream without toppings. The toppings include crushed Oreo cookies, small chocolate chips and strawberries. The company reports the bar has been popular both during and between meal periods. ***—B.S.***

MENUS

■ R&I DATA

FOOD COST INDEX: THE YEAR ENDS WITH PRICES RUNNING MIDDLE OF THE ROAD

Market-basket total for December is $105.93, down almost 3% from November and about 4.5% from October. Chicken prices are at their lowest in four months. Lettuce, at 61 cents for a head of iceberg, equaled its highest cost since June 1986. Coffee prices, at $2.46 a pound, are the lowest since April 1986 when the price was $2.72 a pound.

		% change	
	12/87	11/87	12/86
Hamburger (lb. 85% lean)	$1.29	1	2
Chicken (lb. cut for frying)	.75	-24	-22
N.Y. strip steak (lb./avg.)	3.42	20	-6
Bread (Pullman loaf)	.77	-9	0
Lettuce (iceberg/head)	.61	5	5
French fries (30 lb.)	11.21	-6	-3
Tomatoes (lb.)	.55	6	-2
Milk (gal.)	1.82	5	4
Eggs (doz.)	.70	17	-5
Peaches (case/#10)	18.86	8	8
Peas (case/#10)	11.20	-5	4
Frozen beans (30 lb.)	14.83	-14	-4
Ice cream (vanilla/gal.)	3.37	8	3
Butter (lb.)	1.80	16	7
Cheddar cheese (lb.)	1.61	-2	-9
Sugar (100 lb.)	29.20	-5	-4
Coffee (lb.)	2.46	-10	-25
Breaded fish portions (lb.)	1.48	-2	0

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■ FOOD PRICE UPDATE

Let's Talk Turkey . . . and Other Food News

Turkey supplies up; new pork test approved; fishery officials meet.

Turkey supplies are up and prices are favorable for operators. In some areas the price is between 59 and 69 cents a pound.

"More Americans are consuming turkey than ever before," says Merv Amerine, manager, California Turkey Industry Board. Last year, Americans ate an average of 13½ pounds of turkey meat per person. U.S. Department of Agriculture economists predict that turkey consumption will increase to a hefty 15.6 pounds per person next year, and growers expect the supply to grow 11% to meet the increased demand.

In other news . . . USDA has approved an at-plant method to attain trichina-safe pork. According to the *Pork Report*, the approved use of the ELISA test by the general packing industry represents a significant step forward in the discovery of the actual prevalence of trichina (a worm whose larvae can cause trichinosis) and its eventual eradication. Although the incidence of trichina infection in hogs is rare, what trichina costs U.S. pork producers in terms of consumer doubts and confusion is incalculable. . . . **Officials of three** of the world's largest fisheries associations met Sept. 22, in Orlando, Fla., to discuss international fisheries and environmental issues.

Ron Bulmer, president of Fisheries Council of Canada and Yoshihide Uchimura, president of Japan Fisheries Association, met with Robert Brubaker, president of the National Fisheries Institute of the United States, to explore means of improving communications.

The unprecedented meeting is viewed as a preliminary stage to the organization of an informal coalition of fisheries associations throughout the world. Issues of particular importance to all fishing industries include pollution, selectivity of fisheries technology, marine mammal protection and other uses of the oceans.

—Kathleen Marshall

Turkey supplies are expected to be 11% higher than last year.

NUTRITION REPORT

More Men Using Low-Calorie Products to Reduce Weight

Men cite desire for healthful life style as reason for using sugar substitutes.

Although the popularity of low-calorie products has been growing rapidly since the '60s, when millions of Americans first became interested in fitness and a healthful life style, the ranks of the calorie-conscious have grown in even greater numbers during recent years.

Of the 78 million adult Americans using low-calorie foods and beverages, more than half began using these products within the past five years. One-third began consuming these products during the past three years, according to a national survey recently conducted by the Calorie Control Council.

One of the primary reasons for the increase is that more and more men are being drawn into the low-calorie fold. About six out of 10 male consumers of low-calorie foods and beverages began using these products during the past five years. By comparison, the majority of female consumers began using low-calorie products five or more years ago. Of the total consumers who began using these products during the past five years, nearly half are men. Only 30% of those who began using these products five or more years ago are men.

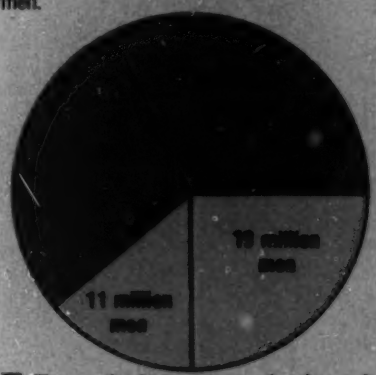
The survey shows that the recent converts to the diet market are more likely to be consuming sugar-free gum or candy and sugar-free powdered drink mixes. Those with a longer history of low-calorie product use are more likely to be consuming sugar substitutes as tabletop sweeteners.

The more recent consumers of low-calorie products have virtually the same reasons for using these products as those with a longer history of use, according to the survey. Primary reasons are to stay in better overall health and to reduce weight.

The research findings are based on projections from a national opinion survey of 1,402 individuals 18 and over. Booth Research Services Inc. conducted the survey in June 1986 for the Calorie Control Council.

MORE MEN STARTING TO SEE THE 'LITE'

Of the 78 million adult Americans who consume low-calorie foods, 53% began using these products within the last five years; 46% of these recent converts to the diet market are men.



■ Those who began consuming low-calorie foods and beverages during the last five years

□ Those who began consuming low-calorie foods and beverages more than five years ago.

Source: Calorie Control Council 1986 National Survey

Nearly half of the converts to sugar-free products within the past five years have been men.

ACTION EXPRESS

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